

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**January 2024**

**Matthew Celenza**

**Boulevard Family Wealth Services, LLC**

**9465 Wilshire Blvd., Suite 840**  
**Beverly Hills, CA 90212**

**Firm Contact:**  
**Shannon McLaughlin**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Celenza that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. McLaughlin if you did not receive CA Family Wealth LLC dba Boulevard Family Wealth's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Celenza is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 2084613.

## Item 2: Educational Background & Business Experience

**Matthew Joseph Celenza**

**Year of Birth:** 1967

### **Educational Background:**

- 1990: Niagara University; Bachelor of Marketing in Business

### **Business Background:**

- 09/2023 – Present Boulevard Family Wealth Services, LLC; Owner & Investment Adviser Representative
- 01/2021 – Present Purshe Kaplan Sterling Investments; Registered Representative
- 07/2017 – Present Boulevard Family Wealth; Owner & Investment Adviser Representative
- 07/2017 – Present Boulevard Insurance Strategies, LLC; Managing Member
- 03/2019 – 02/2021 The Leaders Group, Inc.; Registered Representative
- 11/2012 – 07/2017 Bank of America, N.A.; Financial Analyst
- 07/2012 – 07/2017 Merrill Lynch, Pierce, Fenner & Smith, Inc; Financial Analyst
- 03/2012 – 07/2012 Barclays Capital, Inc; Financial Analyst
- 06/2009 – 03/2012 Morgan Stanley Smith Barney; Financial Analyst
- 07/2001 – 06/2009 CitiGroup Global Markets, Inc; Financial Analyst

### **Exams, Licenses & Other Professional Designations:**

- 1995: Series 7 & 63 Exams
- 1997: Series 65 Exam

## Item 3: Disciplinary Information<sup>1</sup>

Please view Mr. Celenza's disclosure information at <https://adviserinfo.sec.gov/> by searching Mr. Celenza's individual CRD number (2084613).

## Item 4: Other Business Activities

Mr. Celenza is a registered representative of Purshe Kaplan Sterling Investments, member FINRA/SIPC, and licensed insurance agent/broker. He may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the

<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

compensation earned. To mitigate this potential conflict, Mr. Celenza, as a fiduciary, will act in the client's best interest.

Mr. Celenza is a owner of Boulevard Insurance Strategies, LLC, an affiliated insurance agency. He may offer insurance products that generate a commission for Boulevard Insurance Strategies as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict as a fiduciary, he will act in the client's best interest.

Mr. Celenza is a owner and dually registered as an investment adviser representative of Boulevard Family Wealth, LLC, an affiliated registered investment advisor. A conflict of interest arises out of being affiliated with multiple investment advisory firms. To mitigate this conflict, Mr. Celenza will act in the Client's best interest. Furthermore, any services offered through Boulevard Family Wealth, LLC will remain separate from our firm's advisory services and will be governed under a separate agreement.

### **Item 5: Additional Compensation**

Mr. Celenza does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Shannon McLaughlin supervises and monitors Mr. Celenza's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. McLaughlin if you have any questions about Mr. Celenza's brochure supplement at 877-556-5550.

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**Andrea Shieh**

**Boulevard Family Wealth Services, LLC**

**9465 Wilshire Blvd., Suite 840  
Beverly Hills, CA 90212**

**Firm Contact:  
Shannon McLaughlin  
Chief Compliance Officer**

This brochure supplement provides information about Ms. Shieh that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. McLaughlin if you did not receive CA Family Wealth LLC dba Boulevard Family Wealth's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Shieh is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 4819787.

## Item 2: Educational Background & Business Experience

**Andrea Shieh**  
**Year of Birth:** 1983

### **Educational Background:**

- 2004: University of Delaware; Bachelor of Science in Finance

### **Business Background:**

- 09/2023 – Present Boulevard Family Wealth Services, LLC; Investment Adviser Representative
- 03/2019 – Present The Leaders Group, Inc.; Registered Representative
- 07/2017 – Present Boulevard Family Wealth; Investment Adviser Representative
- 07/2017 – Present Boulevard Insurance Strategies; Director of Investments
- 03/2015 – 07/2017 Bank of America, NA; Financial Analyst
- 07/2012 – 07/2017 Merrill Lynch, Pierce, Fenner & Smith, Inc; Financial Analyst
- 03/2012 – 07/2012 Barclays Capital, Inc; Financial Analyst
- 06/2009 – 03/2012 Morgan Stanley Smith Barney; Financial Analyst
- 08/2005 – 06/2009 CitiGroup Global Markets, Inc; Financial Analyst

### **Exams, Licenses & Other Professional Designations:**

- 2006: Series 7 & 66 Exams
- 2012: Certified Investment Management Analyst (CIMA®)

The CIMA® certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting. The designation is administered through Investment Management Consultants Association (“IMCA”). Prerequisites for the CIMA® certification are 3 years of financial services experience and an acceptable regulatory history. To obtain the CIMA® certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider, pass an online Certification Examination, and have an acceptable regulatory history. CIMA® designees are required to adhere to IMCA’s *Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks*. CIMA® designees must report 40 hours of continuing education credits, including 2 ethics hours, every 2 years to maintain the certification.

## Item 3: Disciplinary Information<sup>2</sup>

There are no legal or disciplinary events material to the evaluation of Ms. Shieh.

<sup>2</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

#### **Item 4: Other Business Activities**

Ms. Shieh is a registered representative of The Leaders Group, Inc., member FINRA/SIPC, and licensed insurance agent/broker. She may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned.

Ms. Shieh is dually registered as an investment adviser representative of Boulevard Family Wealth, a registered investment advisor. A conflict of interest arises out of being affiliated with multiple investment advisory firms. To mitigate this conflict, Ms. Shieh will act in the Client's best interest. Furthermore, any services offered through Boulevard Family Wealth will remain separate from our firm's advisory services and will be governed under a separate agreement.

#### **Item 5: Additional Compensation**

Ms. Shieh does not receive any other economic benefit for providing advisory services in addition to advisory fees.

#### **Item 6: Supervision**

Shannon McLaughlin supervises and monitors Ms. Shieh's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. McLaughlin if you have any questions about Ms. Shieh's brochure supplement at 877-556-5550.

#### **Item 7: Requirements for State-Registered Advisers**

Ms. Shieh has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.

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**Michael J. Winn**  
**Boulevard Family Wealth Services, LLC**  
**9465 Wilshire Blvd., Suite 840**  
**Beverly Hills, CA 90212**

**Firm Contact:**  
**Shannon McLaughlin**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Winn that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. McLaughlin if you did not receive Boulevard Family Wealth Services, LLC brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Winn is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #2369114.

## Item 2: Educational Background & Business Experience

**Michael Joseph Winn**

**Year of Birth:** 1963

### **Educational Background:**

- 1986: University of California, Santa Barbara; Attended
- 1983: Mt. San Antonio College; Associate's in General Studies

### **Business Background:**

- 10/2023 – Present Boulevard Family Wealth Services, LLC; Investment Adviser Representative
- 08/2021 – 03/2023 Sanctuary Wealth; Registered Representative
- 01/2021 – 06/2023 InnoVise Family Wealth Advisors; Partner
- 09/2020 – 08/2021 Audent Global Asset Management, LLC; Investment Adviser Representative
- 07/2020 – 09/2020 Cape Securities, Inc.; Registered Representative
- 02/2020 – 09/2020 Private Advisor Group, LLC; Investment Adviser Representative
- 04/2016 – 02/2020 First Republic Investment Management, Inc.; Managing Director
- 04/2016 – 02/2020 First Republic Securities Company, LLC; Managing Director
- 05/2011 – 04/2016 UBS Financial Services, Inc.; Managing Director and Financial Advisor

### **Exams, Licenses & Other Professional Designations:**

- 2000 – Series 6, Series 7, and Series 63 Examinations

## Item 3: Disciplinary Information<sup>3</sup>

Please view Mr. Winn's disclosure information at <https://adviserinfo.sec.gov/> by searching Mr. Winn's individual CRD number (2369114).

## Item 4: Other Business Activities

Mr. Winn has nothing to disclose in this regard.

<sup>3</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.



### **Item 5: Additional Compensation**

Mr. Winn does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Shannon McLaughlin supervises and monitors Mr. Winn's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. McLaughlin if you have any questions about Mr. Winn's brochure supplement at 877-556-5550.

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**Miles Stackpool**  
**Boulevard Family Wealth Services, LLC**  
**9465 Wilshire Blvd., Suite 840**  
**Beverly Hills, CA 90212**  
**Firm Contact:**  
**Shannon McLaughlin**  
**Chief Compliance Officer & Controller**

This brochure supplement provides information about Mr. Stackpool that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. McLaughlin if you did not receive CA Family Wealth LLC dba Boulevard Family Wealth's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Stackpool is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #6965415.

## Item 2: Educational Background & Business Experience

**Miles Ian Stackpool**

**Year of Birth:** 1983

### **Educational Background:**

- 2005: University of Sydney; Business Commerce Accounting/Commercial Law

### **Business Background:**

- 09/2023 – Present Boulevard Family Wealth Services, LLC; Business Development Manager
- 06/2018 – Present Boulevard Family Wealth; Business Development Manager
- 07/2017 – 06/2018 Zehana, LLC; Client Director
- 07/2017 – 09/2017 Citibank HK; APAC Marketing Lead
- 11/2012 – 07/2017 Citibank SG; Banker
- 07/2012 – 07/2017 Macquarie Private Wealth; Banker

### **Exams, Licenses & Other Professional Designations:**

- 2018: Series 65 Exam
- 2014: Client Advisor Competency Standards (Singapore)
- 2014: Capital Markets and Financial Advisory Services (SG)

## Item 3: Disciplinary Information<sup>4</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Stackpool.

## Item 4: Other Business Activities

Mr. Stackpool is dually registered as an investment adviser representative of Boulevard Family Wealth, LLC, an affiliated registered investment advisor. A conflict of interest arises out of being affiliated with multiple investment advisory firms. To mitigate this conflict, Mr. Stackpool will act in the Client's best interest. Furthermore, any services offered through Boulevard Family Wealth, LLC will remain separate from our firm's advisory services and will be governed under a separate agreement.

<sup>4</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

### **Item 5: Additional Compensation**

Mr. Stackpool does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Shannon McLaughlin supervises and monitors Mr. Stackpool's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. McLaughlin if you have any questions about Mr. Stackpool's brochure supplement at 877-556-5550.

### **Item 7: Requirements for State-Registered Advisers**

Mr. Stackpool has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.

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**Shannon McLaughlin**

**Boulevard Family Wealth Services, LLC**

**9465 Wilshire Blvd., Suite 840  
Beverly Hills, CA 90212**

**Firm Contact:  
Shannon McLaughlin  
Chief Compliance Officer**

This brochure supplement provides information about Ms. McLaughlin that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Celenza if you did not receive CA Family Wealth LLC dba Boulevard Family Wealth's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. McLaughlin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #1518897.

## Item 2: Educational Background & Business Experience

**Shannon Kathleen McLaughlin**

**Year of Birth:** 1965

### **Educational Background:**

- Ms. McLaughlin does not have any post-secondary education to disclose.

### **Business Background:**

- 09/2023 – Present Boulevard Family Wealth Services, LLC ; Chief Compliance Officer & Investment Adviser Representative
- 03/2019 – Present The Leaders Group, Inc.; Registered Representative
- 07/2017 – Present Boulevard Family Wealth; Chief Compliance Officer & Investment Adviser Representative
- 07/2012 – 07/2017 Merrill Lynch, Pierce, Fenner & Smith, Inc; Financial Analyst
- 03/2012 – 07/2012 Barclays Capital, Inc; Financial Advisor
- 06/2009 – 03/2012 Morgan Stanley Smith Barney; Financial Advisor
- 03/2007 – 06/2009 CitiGroup Global Markets, Inc; Financial Advisor

### **Exams, Licenses & Other Professional Designations:**

- 1996: Series 7 Exam
- 1997: Series 63 Exam
- 2009: Series 4, 9 & 66 Exams
- 2010: Series 10 Exam

## Item 3: Disciplinary Information<sup>5</sup>

There are no legal or disciplinary events material to the evaluation of Ms. McLaughlin.

## Item 4: Other Business Activities

Ms. McLaughlin is dually registered as an investment adviser representative of Boulevard Family Wealth, LLC, an affiliated registered investment advisor. A conflict of interest arises out of being affiliated with multiple investment advisory firms. To mitigate this conflict, Ms. McLaughlin will act in the Client's best interest. Furthermore, any services offered through Boulevard Family Wealth, LLC will remain separate from our firm's advisory services and will be governed under a separate agreement.

<sup>5</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Ms. McLaughlin is a registered representative of The Leaders Group, Inc., member FINRA/SIPC, and licensed insurance agent/broker. She may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation earned.

#### **Item 5: Additional Compensation**

Ms. McLaughlin does not receive any other economic benefit for providing advisory services in addition to advisory fees.

#### **Item 6: Supervision**

Matthew Celenza supervises and monitors Ms. McLaughlin's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Celenza if you have any questions about Ms. McLaughlin's brochure supplement at 877-556-5550.

#### **Item 7: Requirements for State-Registered Advisers**

Ms. McLaughlin has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.